

# MOVA eGrants

---

## SUBRECIPIENT MANUAL

## Contents

<b>Introduction .....</b>	<b>4</b>
MOVA eGrants Overview .....	4
Current MOVA eGrants Contact Information .....	4
<b>System Requirements .....</b>	<b>5</b>
Internet Connection .....	5
Internet Access .....	5
Enabling Cookies .....	5
Multiple Browser Windows .....	5
Adobe Acrobat DC .....	5
<b>System Login Page .....</b>	<b>6</b>
URL .....	6
MOVA eGrants Portal Home Login Page Sections .....	6
Welcome/Announcements .....	6
MOVA eGrants Portal Login Section .....	6
Logging Into the MOVA eGrants Portal .....	7
Trouble Shooting Issues Logging into the MOVA eGrants Portal .....	7
<b>User Information .....</b>	<b>10</b>
Profile .....	10
Organization Roles and How to Add a User .....	11
<b>Home .....</b>	<b>14</b>
Tabs .....	14
Home .....	14
Administration .....	14
Searches .....	14
Reports .....	15
Icons .....	15
Dashboard .....	15
My Tasks .....	15
Announcements .....	16
My Opportunities .....	16
<b>Applications .....</b>	<b>16</b>
Starting an Application .....	16
Working on an Application .....	17
The Document Landing Page .....	17
Application Forms .....	18
Forms .....	18
Tools .....	20
Status Options .....	25

Related Documents.....	25
<b>Searches.....</b>	<b>25</b>
<b>Reports (Still in the development stages) .....</b>	<b>26</b>
Accessing a Report .....	26
<b>Types of Forms .....</b>	<b>26</b>
Information Forms .....	27
Budget Forms .....	27
Hyperlink Forms .....	28
Upload Forms.....	28
<b>Types of Processes.....</b>	<b>29</b>
Expenditure Report Process.....	29
Out of State Travel Request.....	33
Compliance Monitoring .....	35
The Outcomes Measurement Tool (OMT).....	39

## Introduction

### MOVA eGrants Overview

The MOVA eGrants Portal specializes in improving functionality and ease of use. These are the areas that the MOVA eGrants Portal shines in:

- **MOVA eGrants Dashboard** – The MOVA eGrants Dashboard allows users to easily access grant opportunities, monitoring and compliance reports, and program budgets.
- **SAM.GOV System Interface** – The new system interface automatically gathers address and contact information during registration and confirms a valid UEI (Unique Entity ID). It also allows the system to check for expiration dates and confirm whether an organization can receive federal funding.
- **Easy Configuration of Program Changes** – The MOVA eGrants portal takes advantage of a new drag-and-drop configuration engine to allow users to make changes to their programs. This includes easily updating forms, processes, and reports.
- **Updated Accessibility Features** – MOVA eGrants was built to adhere to ADA and WCAG 2.1 AA standards. The portal will undergo regular 3<sup>rd</sup> party web accessibility compliance audits. It includes new options like a high contrast mode and new branding utilities.

### Current MOVA eGrants Contact Information

MOVA eGrants has supplied the following contact information for users:

Agency/Individual Name	Phone Number	Email Address	Website URL
Agate Software Helpdesk	1 (800) 820-1890	helpdesk@agatesoftware.com	<a href="https://agatesoftware.com/">https://agatesoftware.com/</a>
MOVA Program Coordinator (Contact your Grants Manager)	(617) 448-5542	<a href="mailto:MOVAgants@mass.gov">MOVAgants@mass.gov</a>	<a href="https://www.mass.gov/info-details/egrants">https://www.mass.gov/info-details/egrants</a>

## System Requirements

### Internet Connection

The eGrants system is a website designed for and accessed via the internet. Please ensure connection to internet before attempting to access the system.

### Internet Access

This system was designed to be compatible with common up-to-date web browsers such as Microsoft Edge, Chrome, Firefox, or Safari. If the web browser is not up to date, the following message will display and require updates to the applicable browser:



### Enabling Cookies

The web browser must enable cookies for this site in order to access this portal.

### Multiple Browser Windows

The eGrants system cannot support multiple windows or browser tabs while filling out documents. As this can cause issues with browser cookies resulting in either being kicked out of the system or work being lost, please refrain from accessing the system from multiple windows at one time.

**NOTE: If the user needs to have multiple windows open, please ensure that the user is using a separate browser session for each open window.**

If utilizing Microsoft Edge, click on **File → New Session** for each browser session. Other internet browsers will require third party add-ons to manage multiple browser sessions.

### Adobe Acrobat DC

Adobe Acrobat DC (Adobe Acrobat Reader) is used to view PDF (Portable Document Format) documents. The system will automatically generate grant documents in PDF format using information that has been saved into the various narrative and budget pages. Using Adobe Acrobat DC, the user may choose to view, print, or save these documents. Users who do not have this software installed on their systems will need to download it from [www.adobe.com](http://www.adobe.com).

## System Login Page

### URL

To access the MOVA eGrants portal, type the following into the address bar of the web browser and press **Enter**.  
<https://MOVA.intelligrants.com/>

NOTE: The MOVA eGrants portal does not save the username and password. This option may be available for some browsers.

### MOVA eGrants Portal Home Login Page Sections

Massachusetts Office For Victim Assistance  
**MOVA eGrants**  
Victim & Witness Assistance Board

Welcome to MOVA eGrants, the electronic system for managing grants administered by MOVA.

New System Users

- All new users must register with the system to get login Credentials. You will be notified when your registration is approved.
- Click *New User? Register Here!* link at the bottom of the login box to start your MOVA eGrants registration process.
- [Click here](#) for the MOVA eGrants registration tutorial.

Need Assistance?

- For technical questions on site navigation, contact Agate Software HelpDesk at 1-800-820-1890 or [helpdesk@agatesoftware.com](mailto:helpdesk@agatesoftware.com).
- For general questions about MOVA grants or grant program requirements, contact MOVA at 617-586-1340 or [movav@mass.gov](mailto:movav@mass.gov).
- For specific questions about your currently-funded grant, contact your MOVA grant manager.
- Users are MOVA approved within a 24 hour period.

Login

Username

LSewell321

Password

.....

**Log In**

[Login Assistance](#)

[New User? Click Here](#)

Figure 1 The Login Page

The MOVA eGrants portal login page is organized into **Public Reports**, **Welcome/Announcements**, and **Login** sections.

### Welcome/Announcements

This is the section where users are welcomed to the portal and allowed to view posted announcements. These announcements may include links.

### MOVA eGrants Portal Login Section

The MOVA eGrants portal login process requires a user to enter in a **Username** and **Password** to login.

**NOTE: The password field is case sensitive and will not recognize characters of the wrong case. Precision when entering the username into the username field will decrease the risk of error messages being generated by the system.**

## Logging Into the MOVA eGrants Portal

### *Username*

The username is created by the new user during the registration process OR by the user adding this user to the organization.

### *Password*

The password is created automatically by the portal once a new user is added.

### *Submit Button*

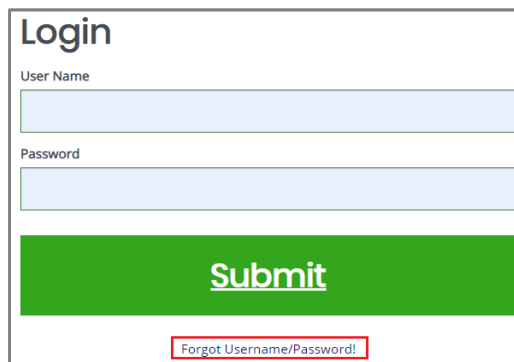
Push the **Submit Button** to login into the MOVA eGrants Portal.

## Trouble Shooting Issues Logging into the MOVA eGrants Portal

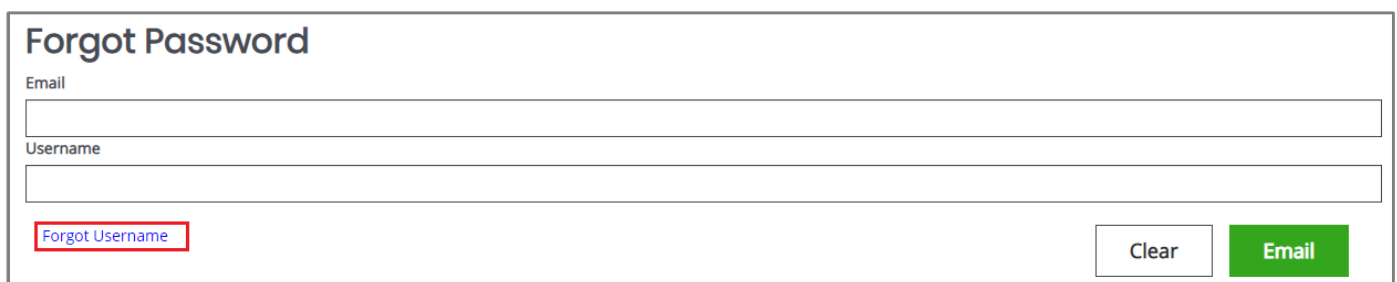
### *Forgot Username*

The MOVA eGrants portal allows the user to request the retrieval of their username. To do so, complete the following steps:

- 1) Click on the **Forgot Username/Password!** link.

A screenshot of the login form. It has a title "Login" in bold. Below it are two input fields: "User Name" and "Password". Below the password field is a large green button with the text "Submit" in white. At the bottom of the form is a red-bordered link that says "Forgot Username/Password!".

- 1) Click on the **Forgot Username** link.
- 2) Enter the email address and click on the **Email** button. An email will be sent to that email address with the user's username.
- 3) The user can follow the instructions in the **"Forgot Password"** section to allow them to log into the system.

A screenshot of the "Forgot Password" form. It has a title "Forgot Password" in bold. Below it are two input fields: "Email" and "Username". Below the username field is a red-bordered link that says "Forgot Username". At the bottom right are two buttons: "Clear" and "Email".

### *"Locked Out"*

Once a user has exceeded 3 login attempts for the portal, they are "locked out." The user may use the **Forgot Password** link to request a temporary password at any point. Instructions for using the "Forgot Password" link are provided below.

### Forgot Password

The MOVA eGrants portal allows the user to request a temporary password be generated and sent to their email address. To do so, complete the following steps:

- 1) Click on the **Forgot Username/Password!** link.
- 2) Enter the username and the email address. Click on the **Email** button. A temporary password will be sent to the email address supplied.

- 3) Once the user has received a temporary password, they will need to login.  
**NOTE: The password field is case sensitive and will not recognize characters of the wrong case. Precision when entering the username into the username field will decrease the risk of error messages being generated by the system.**  
**WARNING: IF YOU COPY AND PASTE YOUR NEW PASSWORD FROM THE EMAIL TO THE LOGIN PASSWORD BOX BE SURE NOT TO COPY AN EXTRA SPACE. THIS WILL LEAD TO UNSUCCESSFUL LOGIN ATTEMPTS AND LOCKOUT FROM THE SYSTEM.**
- 4) At this point, the user will be brought directly to the **Profile** page and requested to create a new password. The user can use the Edit Password button at the bottom of the page to update the password. When the user clicks on the **Edit Password** button, the **Password** and **Confirm Password** fields are available.

### New User

The MOVA eGrants portal allows the user to request access to the system. To do so, complete the following steps:

- 1) Click on the **New User? Click Here** link.

- 2) Fill in the required fields (\*) and any optional fields desired and click on the **Save** button.



**NOTE: Users registering by the *New User* link will need to be approved by pre-existing MOVA eGrants portal users.**

**NOTE: If a user attempts to access the system before they have been approved, the system will show their password as invalid.**

New User Registration

Page instructions for the registration modal

First Name

Middle Name

Last Name

Prefix

Suffix

SAM

Search

FEIN

Organization

Title

Address

Address 2

State

Massachusetts

County

City

Zip Code

Email

Phone

Phone 2

Fax

Cell Phone

Website

Username

Register

### Legend

**First Name (Required)** – the first name of the registering user.

**Middle Name** – the middle name of the registering user.

**Last Name (Required)** – the last name of the registering user.

**SAM (Required)** – the UEI (Unique Entity ID) number for the organization the user is registering with. Enter the UEI number and click **Search** to verify the UEI number for that organization.

**Organization (Required)** – the name of the organization the registering user wants to register under.

**Title** – the position title of the registering user.

**Street Address (Required)** – the street address of the organization the user is registering for.

**State (Required)** – the state drop-down selection for the state of the registering user's organization.

**County (Required)** – the county drop-down selection for the county of the registering user's organization.

**City (Required)** – the name of the city of the registering user's organization.

**Zip Code (Required)** – the zip of the registering user's organization.

**Email (Required)** – the email address of the registering user.

**Phone (Required)** – the phone number of the registering user.

**Username (Required)** – the username the registering user wishes to register for.

**Password/Verify Password (Required)** – the password the registering user wishes to register for.

## User Information

Once a person logs into the system, their **Profile** page and a list of organizations the individual belongs to is visible.

### Profile

#### Profile

##### Basic Information

First Name

Middle Name

Last Name

Prefix

Suffix

Title

Primary Phone

Secondary Phone

Email

##### Address Information

Street Address

City

State

ZIP

County

Job Certification

Security Image

Username

Password

#### Basic Information Legend

**First Name** – the first name of the individual.

**Middle Name** – the middle name of the individual.

**Last Name** – the last name of the individual.

**Prefix** – an optional prefix for the individual.

**Suffix** – an optional suffix for the individual.

**Title** – the position title for the individual.

**Primary Phone** – the primary phone number for the individual.

**Secondary Phone** – the optional secondary phone number for the individual.

**Email** – the email address of the individual.

### Address Information Legend

**Street Address** – the street address for the individual.

**City** – the city the individual's street address is in.

**State** – the dropdown menu of the state the individual's street address is in.

**Zip** – the zip code the individual's street address is in.

**County** – the dropdown menu of the county the individual's street address is in.

### Additional Information Legend

**Job Certification** – a repository for uploading personal certification forms.

**Security Image** – an optional security image to implement as an additional security measure.

**Username** – a label containing the username of the individual and a button that allows the individual to update the username.

**Password** – a label containing the current password of the individual and a button that allows the individual to update the password.

## Organization Roles and How to Add a User

This section contains a table with the label for the role the individual has in that organization, the active date field, the inactive date field, and the name of the person who assigned that individual to the organization.

**NOTE: A person can have multiple organizations listed.**

**NOTE: A person can have multiple roles.**

### New System Roles

Agency Administrator – Manages users and their roles; manages information about the organization; manages assignments of users associated with different Applications and Awards

- *Access to forms: ALL forms available on eGrants*

Application Submitter – Submits complete Applications on behalf of an Entity

- *Access to forms: All functions of application process*

Programmatic Contact – Manages and submits programmatic requirements of Awards, including submission of performance reports, on behalf of an Entity

- *Access to forms: Performance Reports; Programmatic Change Forms; Consultant Request Forms; Travel Authorization Forms, Site Visit Forms, OMT upload tool and process*

Alternate Programmatic Contact – Manages and submits programmatic requirements of Awards, including submission of performance reports, on behalf of an Entity (Alternate if the Programmatic Contact is unavailable)

- *Access to forms: Performance Reports; Programmatic Change Forms; Consultant Request Forms; Travel Authorization Forms; Site Visit Forms, OMT upload tool and process*

Fiscal Contact – Certifies and submits financial information and all federal financial reports on behalf of an Entity

- *Access to forms: Expenditure Reports; Budgets, Fiscal Site Visit Forms, OMT upload tool and process*

**Authorized Representative** – Enters into an agreement on behalf of the Entity and binds it to the Award terms and conditions

- *Access to forms: ALL forms*

**View Only** – Can view all forms within organizations profile

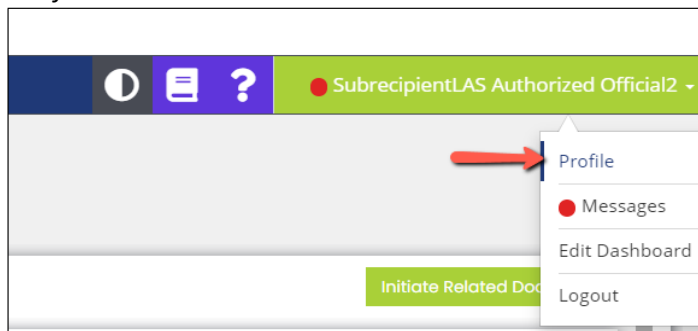
Below is a table that shows which roles can be assigned by the subrecipient. For example, an Authorized Representative can only assign Agency Administrators.

Subrecipient Role	Allowed to Assign
Authorized Representative	Agency Administrators
Fiscal Contact	Fiscal Contact
Agency Administrator	Agency Administrators, Alternate Programmatic Contacts, Application Submitters, Authorized Representatives, Fiscal Contacts, Programmatic Contacts, View Only
Programmatic Contact	Programmatic Contact, Alternate Programmatic Contacts
Alternate Programmatic Contacts	Alternate Programmatic Contacts

### Adding Users to Organizations

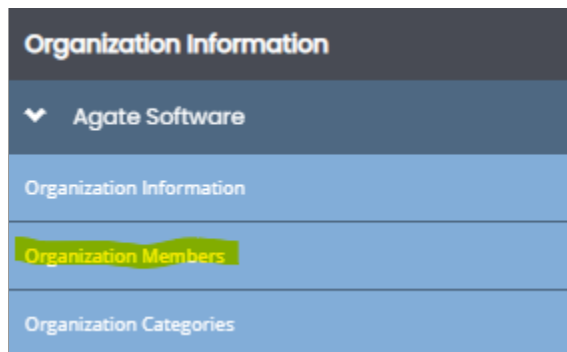
To add a user to an organization:

- 1) Select the logged in user's name in the top right corner.
- 2) Click *Profile*.



- 3) Select *Organization Members* under Organization Information from the left-hand navigation panel. This will take the user to the Organization Members page. Here, they can search for existing members in an organization, view all members within the organization, and add additional members to the organization

**NOTE: If the user has multiple organizations, they will be listed in this navigation panel.**



- 4) In the *Members Search* panel, click the green plus in the right corner.

- 5) Selecting the green plus will bring up the Add Person window. This is where the grantee will fill out the information regarding the new member they are adding. The grantee will need to complete all required fields, assign a role, and create a username and password for the new role.

- 6) After all required fields have been complete, select the green save button in the bottom right to create the new user.
  - a) Best practice is to select Yes from Assign to Existing Documents, which will auto-assign the new user to all current relevant documents based on the role. If not selected, then the user will need to be manually added to each document and sub-document.
- 7) Once the new user logs in with the username and password assigned to them during this process, they will be taken to the New User Update page to confirm user information and update password if necessary.

## Home

The **Home** page is the home page for MOVA eGrants portal users. From here, the rest of the system can be navigated.

**Massachusetts Office For Victim Assistance**  
**MOVA eGrants**  
 Victim & Witness Assistance Board

Home Searches + Subrecipient Authorized Official2 +

### Dashboard

Use the below panels to work with your Grants and Funding Opportunities...

#### My Opportunities

Name	Provider	Availability	Short Description
DDTF Application	Massachusetts Office for Victim Assistance	10/1/2019 12:00:00 AM - 10/1/2022 12:00:00 AM	Drunk Driving Trust Fund - Application
DDTF Letter of Intent	Massachusetts Office for Victim Assistance	9/30/2019 12:00:00 AM - 10/1/2021 12:00:00 AM	Drunk Driving Trust Fund - Letter of Intent
SAFEPLAN Application	Massachusetts Office for Victim Assistance	10/1/2019 12:00:00 AM - 10/1/2022 12:00:00 AM	SAFEPLAN - Application
SAFEPLAN Bidders' Conference	Massachusetts Office for Victim Assistance	2/3/2020 12:00:00 AM - 2/8/2021 12:00:00 AM	SAFEPLAN - Bidders' Conference
SAFEPLAN Letter of Intent	Massachusetts Office for Victim Assistance	9/29/2019 12:00:00 AM - 10/1/2021 12:00:00 AM	SAFEPLAN - Letter of Intent

#### My Tasks

Indicate Related Document

> Filter

##### My Tasks

Name	Organization	Status	Due Date	Document Type	Status Date
-SAFE-BC-2021-Test Org M-1	Test Organization - MOVA	Bidders' Conference in Process		Bidders' Conference	2/6/2020 4:00:09 PM
DDTF-2020-Test Org M-14	Test Organization - MOVA	Application in Process		Application	2/11/2020 1:28:34 PM
DDTF-2020-Test	Test Organization	Application in		Application	2/18/2020

## Tabs

### Home

This is a navigation link that will return the user to the **Home** page from anywhere in the system.

### Administration

This is a navigation link that will users to access the OMT Tools for uploading excel document data to MOVA eGrants.

### Searches

This is a navigation link that will allow the user to conduct document searches for that organization. The user can access this link from anywhere in the system.

### Menu Options

- Applications
- Compliance Monitoring
- Expenditures
- OMT
- Out of State Travel Request




## Reports

Once available, this will be a navigation link that allows the user to access OMT documents available to that organization. The user can access this link from anywhere in the system. More information about this tool and the OMT will be available at a later date.

### Menu Options

Report—if there is a report available for the organization, there will be an arrow that shows the available reports. If there are no reports available, then this area will remain empty.

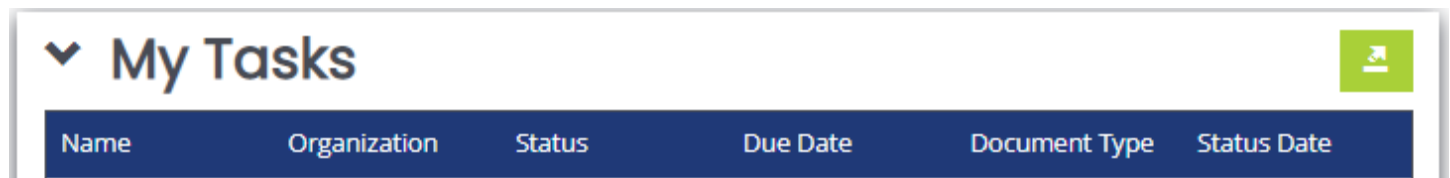
## Icons

	<b>Theme Setting</b>	This button switches the theme visible from black and white to color and vice versa.
	<b>Training Materials</b>	Clicking this button will take users to the User's Manual
	<b>Help</b>	Clicking this button allows general help tips to display about the current item selected.
<b>Name</b>		Clicking on the user's name allows the user to access the <b>Profile</b> , <b>Messages</b> , <b>Edit Dashboard</b> , and <b>Log Out</b> links.

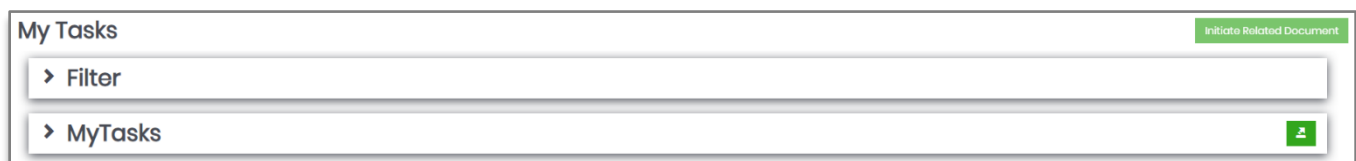
## Dashboard

### My Tasks

**My Tasks** defines the tasks assigned to the user. It also gives the user a way to initiate a related document (like a report or requisition). Your tasks can be organized based on columns by clicking the column title.



This area can also be filtered using the **Filter** function.



### Using the My Tasks Filter

To use the **My Tasks Filter** on a list of tasks assigned to the user, please follow these instructions:

1. Click on the > sign next to the **Filter** header.
2. Enter data into any of the fields and/or select an option from the **Type** drop-down.
3. Click the **Search** button.

1. Filter

2. Name

Organization

Status

Type

3. Search

### Announcements

**Announcements** is an area that allows the user access to announcements from the portal designers. These announcements can include (but are not limited to) training dates, news updates, or website links.

## Announcements

### My Opportunities

The **My Opportunities** area allows the user to start grant opportunity documents (usually applications).

My Opportunities

> Filter

My Opportunities

Name	Provider	Availability	Description
SAFEPLAN Application FY23	Massachusetts Office for Victim Assistance	10/1/2020 12:00:00 AM - 10/1/2023 12:00:00 AM	SAFEPLAN - Application
VOCA Application FY23	Massachusetts Office for Victim Assistance	10/1/2021 12:00:00 AM - 10/1/2022 12:00:00 AM	VOCA - Application

< 1 >

## Applications

### Starting an Application

To start an application, please follow these instructions:

- 1) Click on the relevant application name in the **Name** column. This brings up a menu with more information and the **Agree** or **Decline** buttons.



Sample Program Application

Provided By:

Base Provider Organization

Provided To:

Agate Software

Application Availability Dates:

5/4/2019 10:00:00 AM - 5/25/2022 9:30:00 AM

Description:

Sample Funding Program for the IGX System

Agreement Language:

By selecting the **Agree** button below, I attest that I am a duly authorized representative of the Applicant, and have been authorized by Applicant to make all representations, attestations and certifications contained in this RFP and all Addenda, if any issued, and to execute this Application document on behalf of Applicant. I also attest that the Applicant is eligible to apply for this RFP.

Agree

Decline

2) Click on the **Agree** button.

## Working on an Application

Start the application using the instructions in the previous section.

**NOTE: The default page for the application is the Document Landing Page.**

## The Document Landing Page

The Document Landing Page contains several sections and the **New Note** button in the upper right corner.

Massachusetts Office For Victim Assistance

MOVA eGrants

Victim & Witness Assistance Board

Home

Searches -

DDTF-2020-Test Org M-14

Forms

DDTF Application Forms

Section I

Section II

Section III

Organizational Questionnaire

Subrecipient Authorized Official2 -

New Note

Document Landing Page

View document details.

DDTF Application

DDTF Application

Application

DDTF-2020-Test Org M-14

Organization

Test Organization - MOVA

Your Role

Subrecipient Authorized Official

Application in Process

Application in Review

Application Not Recommended for Funding

Application Recommended for Funding

Contract in Fiscal Review

Subrecipient Signatures Required

Contract Pending Executive Director Signature

Contract Executed

## Application Name

The number listed above the **Forms** header is the application number. It also functions as a link to bring the user back to the **Document Landing Page**. It is important to note the application name in the top left corner, especially if submitting more than one application per organization.

## Document Details

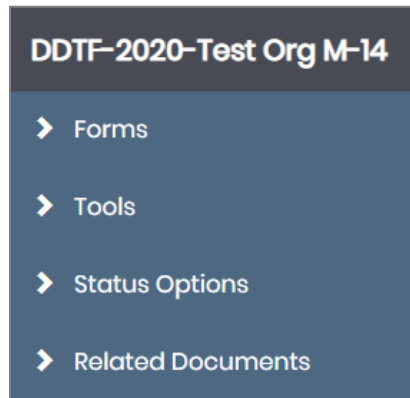
The Document Details section located on the **Document Landing Page** provides visual data including the grant opportunity status, future statuses, the name of the organization, the role of the user currently logged in, and both the **Period Date** and **Due Date**.

### *New Note Button*

The **New Note** button allows a user to leave a note for other users.

### *Forms Menu*

The **Forms Menu** is divided into sections containing individual forms for the user(s) to fill in. There are drop-down arrows next to the Forms header that allow the forms to be hidden and other sections uncovered.



### Legend

**Forms** – the list of forms. Usually forms without sections are listed first, then the form list is broken into sections.

**Tools** – a list of functions available to the user.








**Status Options** – a list of possible status options to apply to the application. This list will vary from user to user, depending on which role the user is logged in as and the current status of the application.

**Related Documents** – a list of related documents (primarily reports) associated with the application.

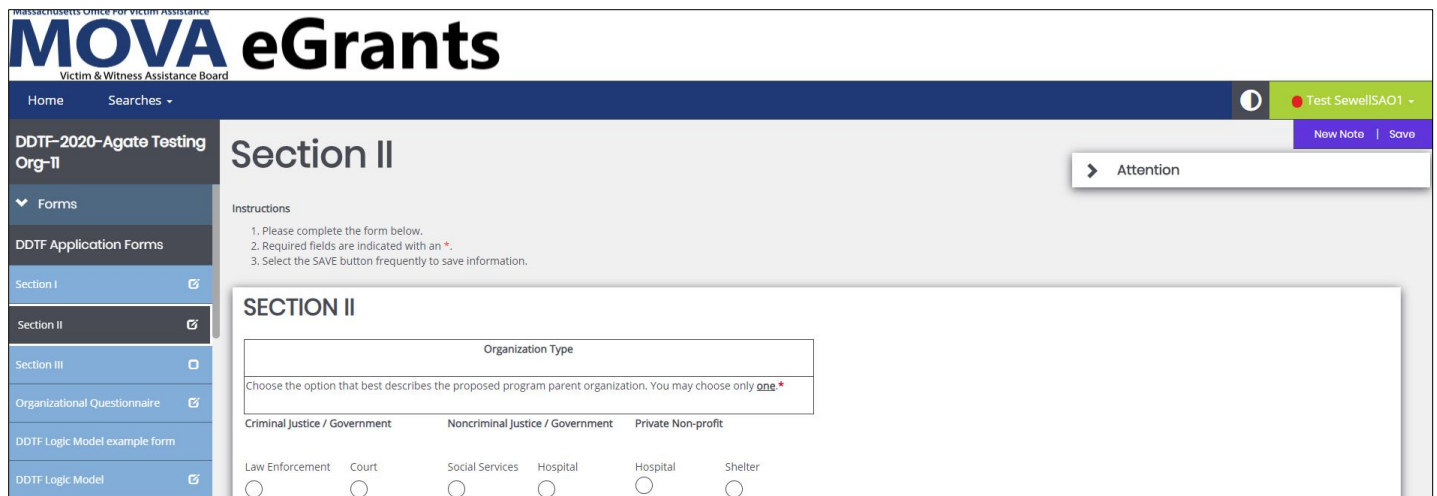
## Application Forms

### Forms

The list of forms is usually divided into sections, with the first section visible being the default form location.

DDTF-2020-Test Org M-14	
▼ Forms	
DDTF Application Forms	
Section I	
Section II	
Section III	
Organizational Questionnaire	
DDTF Logic Model example form	
DDTF Logic Model	
DDTF Budget Forms	
Salary	

Clicking on a form link in any section will bring up that form for the user to fill in.




**MOVA eGrants**  
Victim & Witness Assistance Board


Home Searches ▾


DDTF-2020-Agate Testing Org-II


▼ Forms

DDTF Application Forms


Section I 

Section II 

Section III 

Organizational Questionnaire 

DDTF Logic Model example form

DDTF Logic Model 

## Section II

Instructions

- Please complete the form below.
- Required fields are indicated with an \*.
- Select the SAVE button frequently to save information.

**SECTION II**

Organization Type

Choose the option that best describes the proposed program parent organization. You may choose only **one**.\*

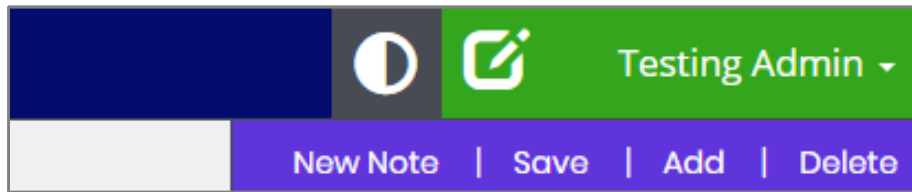
Criminal Justice / Government		Noncriminal Justice / Government		Private Non-profit	
Law Enforcement	Court	Social Services	Hospital	Hospital	Shelter
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Attention

New Note | Save

### Form Options

There are additional tools in the purple banner on the right side of the screen. Below are all the possible options, but not all will be available for all forms.



### Legend

**New Note** – allows the user to create a new note for other users.

**NOTE: For more information, please see the Notes section in the Tools area.**

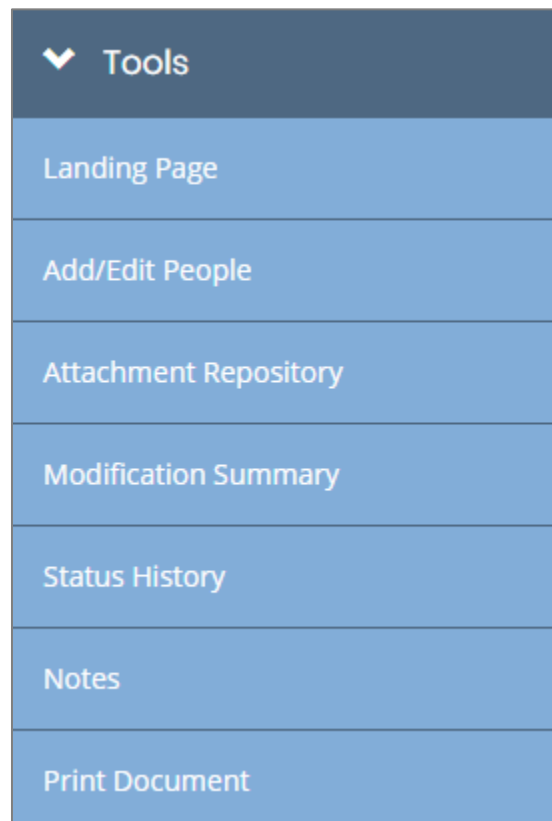
**Save** – allows the user to save the form.

**Add** – allows the user to create an additional instance of the form. It is the digital equivalent to being handed an extra piece of paper of a specific form to staple to an existing packet of forms.

**Delete** – allows the user to delete the instance of the form that is visible to the user. Clicking on the **Delete** button will clear out the fields on the form (including any uploaded attachments).

### Tools

The **Tools** section contains a list of customized tools available to the user depending on the role assigned to the user.



### Legend Summary

**Landing Page** – the default application page.

**Add/Edit People** – allows the user to add/edit other users' access to a specific document, in this case, the application.

**Attachment Repository** – allows the user to access a list of stored attachments.

**Modification Summary** – allows the user to access a summary of modifications for a specific document.

**Status History** – allows the user to access a history of the status(s) of a specific document.

**Notes** – allows the user to create/view/edit notes for a specific document.

**Print Document** – allows the user to create a PDF of the document.

### *Landing Page*

Clicking on this link returns the user to the **Document Landing Page**.

### *Document Add/Edit People*

This tool allows authorized users to add/edit people to the document.

▼ People Assigned to this Document <span style="float: right;">+</span>				
Person	Organization	Role	Active Dates	Assigned By
SewellS1, Test	Agate Testing Org	Subrecipient Staff	02/24/20 -	Grant System
SewellSAO1, Test	Agate Testing Org	Subrecipient Authorized Official	02/24/20 -	Grant System
SewellSPA1, Test	Agate Testing Org	Subrecipient Program Administrator	02/24/20 -	Grant System
« 1 »				

### *Adding/Assigning People to the Document*

To add/assign a person to the document, please follow these instructions:

- 1) Click on the **Plus Sign** button on the **People Assigned to this Document** panel.
- 2) Select the **Person** and **Role** options from the drop-down menus.
- 3) Click the **Save** button.

**NOTE: This will automatically assign today's date. If a past active date is required, please use the menu in the Active Date field to select the date.**

### Document Person

Person

Role

Active Date
Inactive Date

Save

### *Editing People Assigned to the Document*

To edit the role of a user assigned to the specific document, please follow these instructions:

- 1) Click on the **Pen** button on the right side.
- 2) Select a role from the **Role** drop-down list.
- 3) Click the **Save** button.

**Optional: Update the Active Date field.**

Document Person

Person

SewellS1, Test

Role

Subrecipient Staff

Subrecipient Authorized Official

Subrecipient Program Administrator

Subrecipient Staff

Save

Attachment Repository

This tool allows the user to view files that have been added as attachments throughout the document.

Document Modification Summary

This tool allows the user to view and/or download the modification summary.

Status History

This tool allows the user to view the status of the document – including the **Status** name, **Date/Time** the document had that status, and the name of the **Person** who changed the status of that document. There is also a field for status notes.

Notes

This tool allows the user to add/edit notes.

Add a new message





Adding a New Note

Please use these instructions to create a note.

- 1) Click on the **New Note** button.
- 2) Fill in the field.
- 3) Click on the **Paperclip** icon to attach files.
- 4) Click on the **Paper Airplane** icon to SAVE the note.

Additional Fields

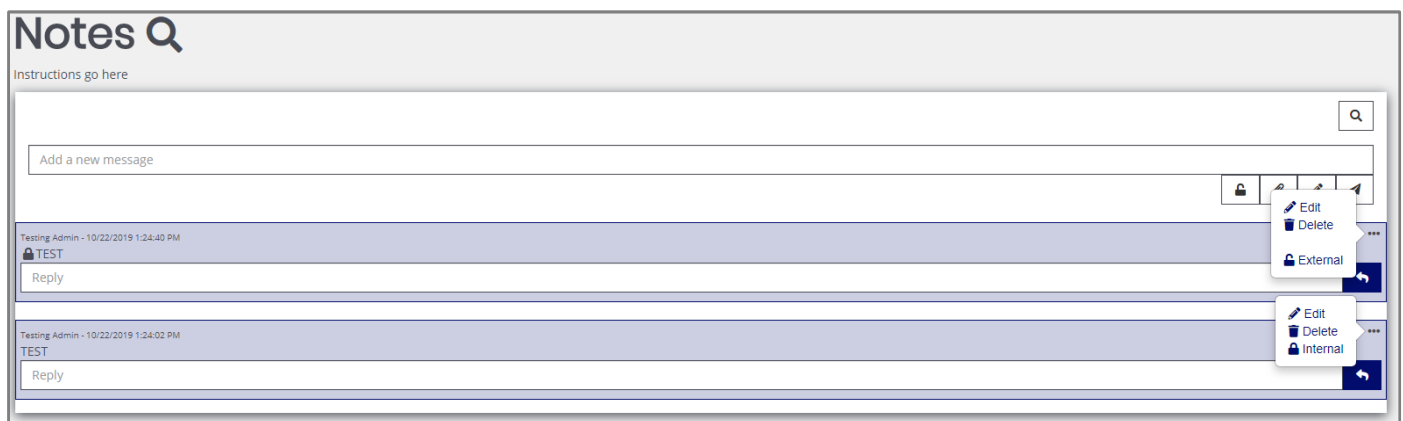
Icon	Name	Description
------	------	-------------

	Internal Note	This tool locks this note into the form as an internal note. The internal notes are only visible to members within the same organization.
	Attachment(s)	This tool allows the user to add attachments to the note.
	Editor	This tool allows the user to edit a note.
	Save Note	This tool allows the user to save the note.

### Locating a Note

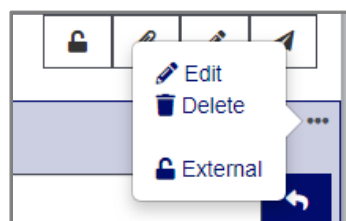
Once a note is created, it ends up in the **Notes** area of the **Tools** menu. To access the note, please follow these instructions:

- 1) Click in the **Forms** section to minimize that section.
- 2) Click on the **Notes** link in the **Tools** section.



### Updating a Note

- 1) Click in the **Forms** section to minimize that section.
- 2) Click on the **Notes** link in the **Tools** section.
- 3) Click on the ... icon. This brings up the **Edit**, **Delete** and **External/Internal** tool buttons.



- 4) Click on the **Edit** tool to edit the text field.

Testing Admin - 10/22/2019 1:24:40 PM

TEST

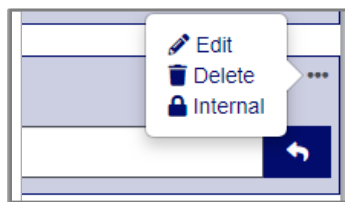
Select

Reply

- 5) Click in the text field to adjust the formatting and/or the contents of the note.
- 6) Click the paper airplane icon to save the updates to the note.

### Deleting a Note

- 1) Click in the **Forms** section to minimize that section.
- 2) Click on the **Notes** link in the **Tools** section.
- 3) Click on the ... icon. This brings up the **Edit**, **Delete** and **External/Internal** tool buttons.



- 4) Click on the **Delete** button to delete the note.

### Replying to a Note

- 1) Click in the **Forms** section to minimize that section.
- 2) Click on the **Notes** link in the **Tools** section.
- 3) Add a response to the **Reply** section and click on the airplane icon.

Testing Admin - 10/22/2019 1:24:40 PM

TEST

Testing Admin - 10/22/2019 1:42:33 PM

TEST 2.0

Reply

### Print Document

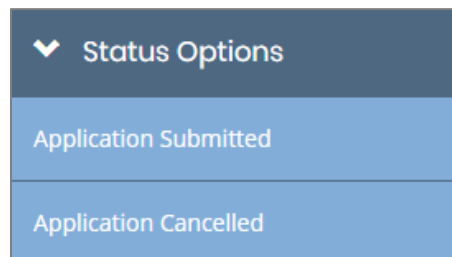
This tool allows the user to create a PDF version of the document to save onto the user's computer and/or print out. Each form has the option of being included in the printout (with both questions and answers), excluded in the printout, or including a blank version of that form.

	Include	Exclude	Include Blank Copy
ALL	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
OR			
Section I	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Section II	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Organizational Questionnaire	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Court Coverage	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Salary	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>



### Status Options

The **Status Change** area allows the user to change the status of a document. This is normally useful for submitting applications, signing contracts, or requesting grant modifications.

A screenshot of a dropdown menu titled "Status Options" with a downward arrow icon. The menu is open, showing two options: "Application Submitted" and "Application Cancelled".

Status Options
Application Submitted
Application Cancelled

### Related Documents

The **Related Documents** section is where the user can access documents (such as reports) that are related to the application/contract.

## Searches

The **Searches** tab is used to quickly locate specific documents. Different types of searches have their own search sections set up. The sections below explain how to use these search sections.

### Legend

**Name** – A text field for the name of the document.

**Organization** – A text field for the name of the organization that created the document.

**Type** – A drop-down list to select the type of document from.

**Status** – A drop-down list to select a specific document status from.

**Sub Code** – A text field to enter the sub code of the document in.

To use this search tab, please follow these instructions:

- 1) Select the **Searches** tab and select the document type you are searching for: Applications, Compliance Monitoring, Expenditures, OMT, or Out of State Travel Request.
- 2) OPTIONAL: Enter in search parameters. Click the **Clear** button to clear out search parameters.
- 3) Click the **Search** button.
- 4) Click on the name of a specific document in the **Name** column.

### Document Search

Name

Organization

Type

Status

Sub Code

Clear

Search

Documents

Name	Organization	Type	Status	Sub Code
Application-Agate Software-1	Agate	Sample Program Application	Application in Phase 1 Review	2018

## Reports (Still in the development stages)

This tab is used to access reports that were created using the **Report Builder** tool. The reports and report groups that visible are entirely dependent on what reports and report groups are created.

### Accessing a Report

To access a report, please follow these instructions:

- 1) Go to **Reports** → [Specific Report Group (Optional)] or [Specific Report].
- 2) Enter in search criteria (optional) and click the **Search** button.

### KY Report Sample

Search Criteria

Search

Export to Excel

Drag a column header and drop it here to group by that column

Organization	Doc_Number	Status	Type
Agate		Default	Organization Details
Base Applicant Organization		Default	Organization Details
Org 123		Default	Organization Details
Grant System		Default	Organization Details
Org Test Manager		Default	Organization Details
Test Org BG		Default	Organization Details
Jons Org		Default	Organization Details
Test Org 11-04-2019		Default	Organization Details
Another Org		Default	Organization Details

## Types of Forms

There are several types of forms within the MOVA eGrants system. These forms can be found within the left-hand navigation pane of the Opportunity that the user is submitting for.


## Information Forms

**Section I Form:** This form will require the user to fill out necessary information marked with red asterisks. Upon saving the page, users will be flagged with an error message if required fields are not complete. Forms that require completion will show an empty checkbox in the left-hand navigation panel. The user can also save a form at any time and come back to it later. Forms that have been saved and still require information will show a pencil icon in the left-hand navigation panel.


**SAFEPLAN RGA**

Request for Grant Applications (RGA)

**SAFEPLAN Application Forms**

**Section I** 

Section II ☐


Organizational Questionnaire 

Court coverage Agreement Example form

Court Coverage ☐

**SECTION I**

**Agency Information**

Agency Information	Agency Leadership Information
Fill out this section with all the contact information for the program's <b>host agency</b> including the <b>legal name</b> (as it appears on the IRS Form 990), your <b>"dba" name</b> if applicable, and the <b>four digit zip code extension</b> .	Fill out this section with all the contact information for the <b>leadership</b> of the program's <b>host agency</b> , such as the Executive Director.
Legal Name* 	Name*
<input type="text"/>	<input type="text"/>
DBA*	Title*
<input type="text"/>	<input type="text"/>
Legal Address*	Mailing Address*
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>
Telephone*	Telephone* <span style="margin-left: 20px;">Ext. <input type="text"/></span>
<input type="text"/>	<input type="text"/>
Website*	Fax
<input type="text"/>	<input type="text"/>
Agency DUNS Number*	E-mail*
<input type="text"/>	<input type="text"/>

## Budget Forms

**Salary Form:** Subrecipients will have the option to enter direct costs or administrative costs to their application. The subrecipient will be asked to enter information in relation to their request for funding. Each direct row and administrative row will have the ability to add more line items with the green + sign. Pressing the + sign will add a row to the section. Once a second row is added, a – sign will be become available for deleting unwanted rows. Clicking the – sign will erase a row from the screen. The first field (Employee Name) will populate into the Budget Narrative section. The subrecipient will then be asked to fill out the form with more data.

**WARNING:** You cannot change your cent decimal places by placing the cursor behind the last number entry.

**NOTE:** To change the Cent decimal places, place the cursor behind the decimal point and ahead of the first number.

After that, just select the numbers you wish to replace others with.

Example: .|99

**SAFEPLAN Budget Forms**

- Salary** (Selected)
- Fringe Benefits
- Office & Programmatic Supplies
- Travel
- Other Costs
- Indirect Costs

**Personnel - Salary**

**Direct Cost**

Employee Name	Title	Hours per Week	Weeks per Year	Total Salary Cost	Total Salary Cost
test user 1				\$	\$0.00
				\$	\$0.00
Total:				\$0.00	\$0.00

**Administrative Cost**

Employee Name	Title	Hours per Week	Weeks per Year	Total Salary Cost	Total Salary Cost
test user 2				\$	\$0.00
Total:				\$0.00	\$0.00

**Budget Narrative for Salary**

Employee Name	Budget Narrative
test user 1	
test user 2	

## Hyperlink Forms

Contractor Authorized Signatory Listing Hyperlink: When this type of form is selected, it will prompt a file download for the user to fill out and save.

To prompt a file download, please follow these instructions:

- 1) Click the Hyperlink Form on the left-hand navigation panel.
- 2) This will prompt a file download to appear at the bottom of the screen.
- 3) Click on the file's upload arrow to open the document.

**NOTE: Clicking this upload arrow does not automatically save the file.**

**Signatures**

- Contractor Authorized Signatory Listing Hyperlink** (Selected)
- Contractor Authorized Signatory Upload
- Adherence to Policies & Procedures Hyperlink
- Adherence to Policies & Procedures Upload
- SAFEPLAN MOU
- Required Uploads**
  - Required Uploads Form

b6ae00fd-aa6b-4....docx

## Upload Forms

Required Uploads Form: This form will require the user to upload specific documents.

To upload a document, please follow these instructions:

- 1) Click the purple “Select” button on the form to open the File Explorer popup window.
- 2) Locate the desired file.
- 3) Click “Open.”

Once the file has been successfully uploaded, the user should see the file name displayed underneath the upload field. To delete an unwanted file, click the ‘X’ found at the end of the uploaded document.

**VICTIMS OF CRIME ACT (VOCA) GRANT APPLICATION FORMS**

Section I ☐

Section II ☐

Organizational Questionnaire ☐

**Required Uploads**

Required Uploads ☐

### Required Uploads

1a. Select your indirect rate, if applicable\*

Federally Approved Indirect Rate	10% De Minimis	MOVA-Negotiated Indirect Rate	Not Applicable
<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>

1b. Indirect Request Letter\*

Select
Drag Files Here

2. Funding Request Prioritization Form\*

Select
Drag Files Here

## Types of Processes

There are several types of processes within the MOVA eGrants system.

### Expenditure Report Process

This process is initiated by an Agency Administrator, Authorized Representative, or Fiscal Contact. Log in as one of these roles and find an application that is in the Contract Executed status to initiate an Expenditure Report.

**NOTE: If you were part of the contract before it started, you’ll be able to find this document in your “My Tasks” section of the Home screen.**

- 1) Under the MOVA eGrants logo in the top left corner, click on Searches
- 2) Select Applications.
- 3) In the Status dropdown, find Contract Executed and select it.
- 4) Click the green Search button. This should populate all the applications in the Contract Executed status.
- 5) If you are finding your contract this way you have not yet been added to the document. Please see the add/edit portion of this manual to add yourself to this document or have your Agency Administrator or Authorized Official help you.

**NOTE: Depending on the program the user is looking for (ex: DDTF, VOCA, SAFEPLAN, VOCA Training), they may need to select the specific program in the Type dropdown.**

### VOCA with Match, VOCA without Match, SAFEPLAN, DDTF Programs

Forms that need to be filled out: *Backup Worksheet, Expenditure Summary*

*Backup Worksheet*

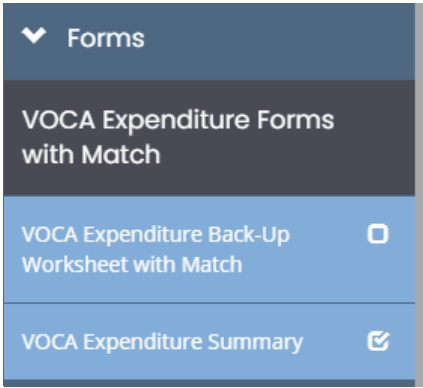
The Backup Worksheet is a form where the user will enter in the funds spent. Once a user enters data into the Backup Worksheets, data will be copied onto the next Expenditure Report initiated after it and so on. When the next Expenditure Report is initiated, it will pull the data from the last Expenditure Report and populate the Backup Worksheet from the last Backup Worksheet created. Although the data will be auto-populated, it can and should be altered to reflect the current Expenditure Report at hand.

*Expenditure Summary*

The Expenditure Summary form keeps track of the funds entered on the Backup Worksheet. It is a summary of current and past expenditures for the contract and was formerly the coversheet to the Excel expenditure reports submitted before FY23.

**Finding & Completing Expenditure Forms**

Once an Expenditure Report is initiated, the user will have access to the required forms. On the left-hand navigation panel, locate the section titled Forms. This is where the Expenditure Report forms are located. The user can select which forms they would like to view or work on. Both the VOCA Expenditure Back-up Worksheet with Match and VOCA Expenditure Summary are links that will enter you into the form. Enter and save your data in the Back-up Worksheet by selecting the **Save** button in the top right corner, then view the summary to see present and past Expenditure Report data.



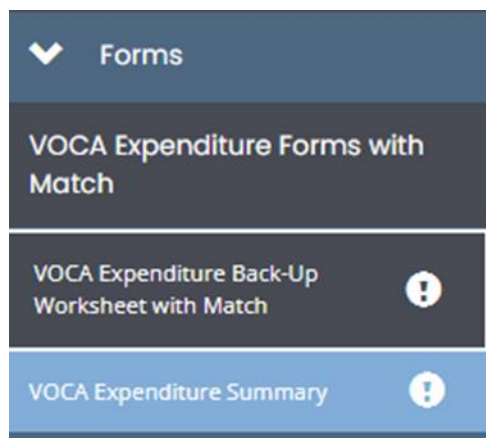
**VOCA Expenditure Summary with Match example**

Funding Source(s):			
VOCA Expenditures			
		Year-To-Date Spending Approved	
Budget Cost Category	VOCA Approved Budget	\$ Amount	% Amount
<b>Personnel</b> (Salary + Fringe)	\$0	\$0	%
Salary	\$0	\$0	%
Fringe	\$0	\$0	%
<b>Consultants</b>	\$0	\$0	%
<b>Office &amp; Admin</b>	\$0	\$0	%
<b>Other</b> (Equipment+ Travel + Contracts + Other + Indirect)	\$0	\$0	%
Equipment	\$0	\$0	%
Travel	\$0	\$0	%
Contracts	\$0	\$0	%
Other	\$0	\$0	%
Indirect	\$0	\$0	%
<b>Totals:</b>	\$0	\$0	%

	Year-To-Date Spending *Pending GM Approval*	
Current Period Request	\$ Amount	% Amount
\$0	\$0	%
\$0	\$0	%
\$0	\$0	%
\$0	\$0	%
\$0	\$0	%
\$0	\$0	%
\$0	\$0	%
\$0	\$0	%
\$0	\$0	%
\$0	\$0	%
\$0	\$0	%
\$0	\$0	%

Match Expended					
		Year-To-Date Match Amount Expended			
Budget Cost Category	Approved Match	\$ Amount	% Amount	Match Expended Current Period	Year-To-Date Match Expended *Pending GM Approval*
Personnel (Salary + Fringe + Consultants + Office & Admin)	\$0	\$0	%	\$0	\$0
Salary	\$0	\$0	%	\$0	\$0
Fringe	\$0	\$0	%	\$0	\$0
Consultants	\$0	\$0	%	\$0	\$0
Office & Admin	\$0	\$0	%	\$0	\$0
Other (Equipment+ Travel + Contracts + Other + Indirect)	\$0	\$0	%	\$0	\$0
Equipment	\$0	\$0	%	\$0	\$0
Travel	\$0	\$0	%	\$0	\$0
Contracts	\$0	\$0	%	\$0	\$0
Other	\$0	\$0	%	\$0	\$0
Indirect	\$0	\$0	%	\$0	\$0
Totals:	\$0	\$0	%	\$0	\$0

If the side panel shows a (!) for either of the forms, visit the form and fix the error indicated by the system. Expenditure reports or any other forms cannot be submitted with errors.

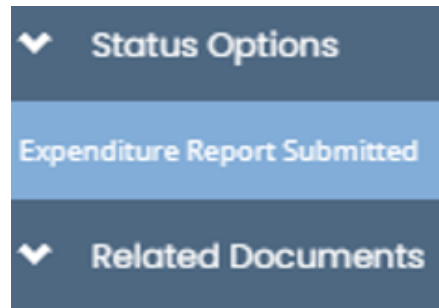


### Submitting Expenditures

After a user has initiated an Expenditure Report, filled it out to their satisfaction and is ready for MOVA to review, they will have to submit their report. To move to the next step of the process, the user will need to select Expenditure Report



Submitted and confirm the status change. On the left-hand navigation panel under the heading Status Options, there will be the option to submit: (*close to the bottom of the menu*)



Clicking on Expenditure Report Submitted will bring up a window and allow the user to enter comments about this submission or just click OK to confirm submission for MOVA's for their review and approval.

### Expenditure Modifications

During MOVA's review, they may require more information from your agency on this Expenditure Report. If that happens, MOVA will push the status of this report to Expenditure Report Modifications Required. This will send out a notification/email to relevant users, requiring follow up. Once you are in your Expenditure Report, review the Notes section of the document to see what MOVA may require from you. After completing the edits, resubmit this document utilizing the Status Options in the left-hand Navigation Panel.

### Expenditure Notifications

Certain users will receive notifications upon different status changes. The system notification and email will be sent out once the Expenditure reaches its trigger status. For example, when an Expenditure is created it is considered "In Process." When the user has confirmed submission, the Expenditure moves into the status "Expenditure Report Submitted." A notification will be sent once the user pushes to this status.

Expenditure Report in Process TO Expenditure Report Submitted

- *Sent To: Authorized Representative, Agency Administrator, Fiscal Contact*

Expenditure Report in GM Review TO Expenditure Report Modifications Required

- *Sent To: Authorized Representative, Agency Administrator, Fiscal Contact*

Expenditure Report Ready for Approval TO Expenditure Report Processed

- *Sent To: Authorized Representative, Agency Administrator, Fiscal Contact*

## Out of State Travel Request

This process is initiated by an Agency Administrator, Authorized Representative, Programmatic Contact, or the Alternate Programmatic Contact. Log in as one of these roles and find a contract that is in the Contract Executed status to initiate the travel request process.

**NOTE: If you were part of the contract before it started, you'll be able to find this document in your "My Tasks" section of the Home screen.**

- 1) Under the MOVA eGrants logo in the top left corner, click on Searches
- 2) Select Applications

- 3) In the Status dropdown, find Contract Executed and select it.
- 4) Click the green Search button. This should populate all the applications in the Contract Executed status.  
**NOTE: Depending on the program the user is looking for (ex: VOCA or SAFEPLAN), they may need to select the specific program in the Type dropdown**

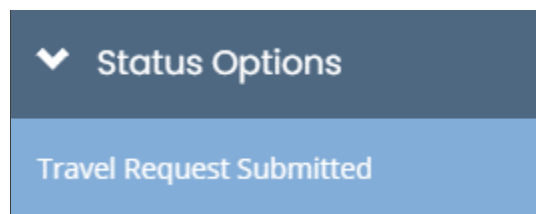
### Initiating a New Out of State Travel Request

Once an Application/Award reaches the status of Contract Executed, the Agency Administrator, Authorized Representative, Programmatic Contact and Alternate Programmatic Contact rolls will all have the ability to create a new Out of State Travel Request. This process will occur the same way for both SAFEPLAN and VOCA programs.

- 1) Enter an application/award.
- 2) Scroll down on the left-hand side menu until you reach Related Documents.
- 3) Click on the Initiate Related Doc button.
- 4) In the dropdown select the Out of State Travel Request option.
- 5) Select the Create button.
- 6) User is then taken to the new Out of State Travel Request forms.

### Submitting Travel Request

When a user has filled out the form without error and is satisfied with the content, they can submit their request for MOVA's review. To move to the next step of the process the user will need to select the Travel Request Submitted selection from the left-hand navigation panel under the heading Status Options and select OK to confirm submission.



### Travel Request Modifications

During MOVA's review, they may require more information from your agency on this the Out of State Travel Request. If that happens, MOVA will push the status of this report to Travel Request Modifications Required. This will send out a notification/email to relevant users, requiring follow up. Once in the Out of State Travel Request, review the Notes section of the document to see what other information MOVA may require from you. After completing the edits, resubmit this document utilizing the Status Options in the left-hand Navigation Panel.

### Travel Request Notifications

Certain users will receive notifications upon different status changes. The system notification and email will be sent out once the Travel Request reaches its trigger status. For example, when a Travel Request is created, it is considered "In Process." When the user has confirmed submission, the report moves into the status "Travel Request Submitted." A notification will be sent once the user pushes to this status.

#### Travel Request in Process TO Travel Request Submitted

- *Sent To: Authorized Representative, Agency Administrator, Programmatic Contact, Alternate Programmatic Contact*

#### Travel Request in Review TO Travel Request Modifications Required

- *Sent To: Authorized Representative, Agency Administrator, Programmatic Contact, Alternate Programmatic Contact*

Travel Request in Review TO Travel Request Denied

- *Sent To: Authorized Representative, Agency Administrator, Programmatic Contact, Alternate Programmatic Contact*

Travel Request in Review TO Travel Request Approved

- *Sent To: Authorized Representative, Agency Administrator, Programmatic Contact, Alternate Programmatic Contact*

## Compliance Monitoring

Every two years, at a minimum, each subrecipient is required to undergo a formal compliance monitoring process with MOVA, also known as a site visit. While the site visit itself will still be performed either in person or virtually, the pre-visit and post-visit processes will be conducted via eGrants. When MOVA initiates this process in eGrants, subrecipients will receive a notification via email and have access to pre-site visit worksheets to be filled out in the status of Pre-Visit Worksheets. MOVA may also initiate this process if a compliance issue has been identified outside of the site visit process. In this case, pre-visit worksheets will not be utilized, and the process will begin in the status is Monitoring Finding Acknowledgement Required and an Acknowledgement Form will need to be completed by the user. See the Site Visit Report and Monitoring Findings Acknowledgement section below for more information about this process which will start with a Finding Form.

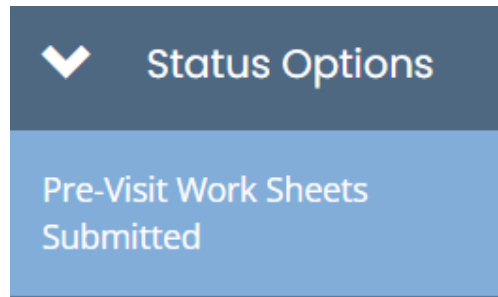
**NOTE: If a user was part of the contract before the Compliance Monitoring Process started, they will be able to find this document in the “My Tasks” section of the Home screen.**

- 1) Under the MOVA eGrants logo in the top left corner, click on Searches
- 2) Select Compliance Monitoring
- 3) Click the green Search button. This should populate the Compliance Monitoring Report for the organization.

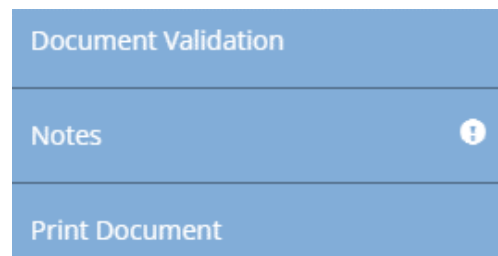
### Pre-Visit Worksheets

When a Compliance Monitoring Report is initiated for the organization, the first step is to fill out the pre-visit worksheets and submit the completed forms to MOVA for review before the assigned deadline. The forms that need to be filled out are the same for all programs. Within these forms you will select which types of MOVA-administered awards your agency receives and those selections will populate questions to be completed specific to the award type. (Forms: Fiscal Monitoring Worksheet, Award Administration Monitoring Worksheet, and Programmatic Monitoring Worksheet)

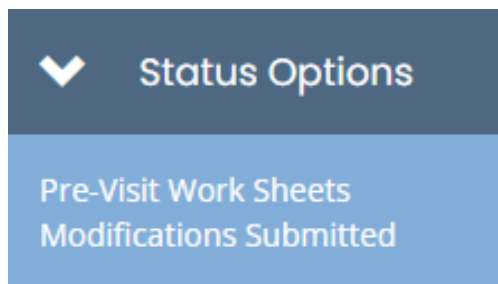
Once the worksheets have been filled out completely and saved successfully they should be submitted to MOVA. In order to submit these forms, from the Compliance Monitoring Report page, select the Pre-Visit Worksheets Submitted selection from the left-hand navigation panel under the heading Status Options and choose OK to submit. The status will then change to Pre-Visit Worksheets in Review.



After MOVA has reviewed the submitted worksheets, users may get the Pre-Visit Worksheets back for further updating in the status of Pre-Visit Worksheets Modifications Required if there is missing information or incomplete answers. If modifications to the worksheets are required, users will need to update sections of the forms which they previously filled out. If MOVA changes the status to Pre-Visit Worksheet Modification Required, feedback on which questions within the Pre-Visit Worksheet need attention will be provided by MOVA in the Notes section. Select the Notes selection from the left-hand navigation panel under the heading Tools. The notes section will indicate where additional attention is needed within the worksheets.

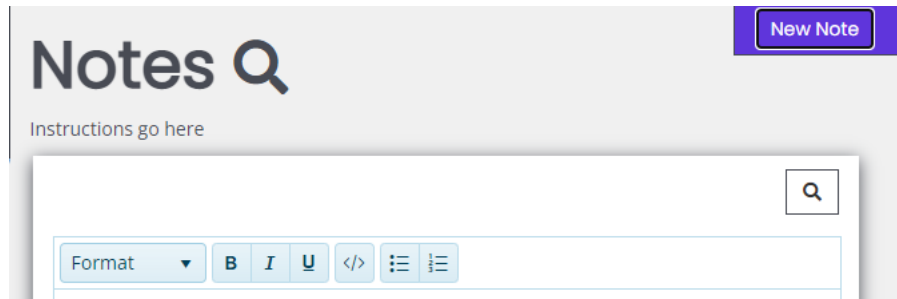


Once the requested modification have been made, from the Compliance Monitoring Report page, select the Pre-Visit Worksheets Modifications Submitted selection from the left-hand navigation panel under the heading Status Options and choose OK to submit. The status will again change to Pre-Visit Worksheets in Review. This process can occur as many times as MOVA requires until the Pre-Visit Worksheets are completed successfully.

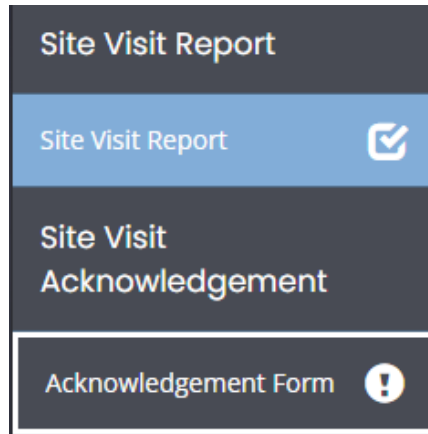


### Site Visit Report and Monitoring Findings Acknowledgement

The next steps in the Compliance Monitoring process will take place after the site visit itself. Following the site visit, users will get notification of being in the status of Monitoring Follow-up in Process or Monitoring Finding Acknowledgement Required. If the status is Monitoring Follow-up in Process, users will need to review the Notes section once again and follow the direction provided by MOVA on follow-up items needed. To compose a note in return, be sure to select the New Note button in the upper right-hand corner of the screen. Once selected a new note will open that can be composed and sent to MOVA. Attachments can also be uploaded and attached to the note.



If the status is Monitoring Finding Acknowledgement Required, users will need to fill out the Acknowledgement Form. The Acknowledgment Form is based on the Site Visit Report form which will be available for the users to view under the Forms heading in the left-hand navigation panel. The Acknowledgement Form can be accessed under the Forms heading in the left-hand navigation panel.



The Acknowledgement Form will outline any findings identified within the compliance monitoring process. For any compliance issues identified outside of site visits, the process will begin with the Acknowledgement Form. This form will outline any findings and whether there are any Corrective Actions required in order to resolve identified findings. In order to complete the Acknowledgement Form any findings must be acknowledged and any requested corrective actions must be submitted.

In the example below, there was a programmatic finding identified that has an associated corrective action. The finding must be acknowledged via the 'acknowledgment' radio button, the corrective action response field must be completed, and any necessary documents related to the corrective action must be uploaded into the 'Corrective Action Upload' field.

### Programmatic Findings

<b>Finding Date:</b>	<b>Finding Title:</b>	<b>Finding Description:</b>
07/01/2022	EEOP	Verification of completion of steps to be in compliance with EEOP requirements was not available at time of site visit.

**Is Corrective Action Required?** Yes ☒ No ☐  
(filled in by MOVA)

**Response Time or Due Date:** 08/01/2022 **Corrective Action Request:** Submit verification that EEOP requirements have been satisfied.

**Acknowledgement:** ☒

**Corrective Action Response:**

**Corrective Action Upload:**

Select

Drag Files Here

If there were no findings identified, the Acknowledgement Form must still be completed to acknowledge that there were no findings by selecting the 'acknowledgement' radio button. If there were no findings identified, that information will be conveyed in the Acknowledgement Form. See example below.

### Fiscal Findings

<b>Finding Date:</b>	<b>Finding Title:</b>	<b>Finding Description:</b>
07/01/2022	N/A	No fiscal findings identified

**Is Corrective Action Required?** Yes ☐ No ☒  
(filled in by MOVA)

**Acknowledgement:** ☒

Once the Acknowledgement Form is filled out and saved successfully without error, it can be submitted to MOVA for final reviews and approval. This form should be completed and submitted before the assigned deadline. In order to submit the Acknowledgement Form, from the Compliance Monitoring Report page, select the Monitoring Finding

Acknowledgement Submitted selection from the left-hand navigation panel under the heading Status Options and choose OK to submit.

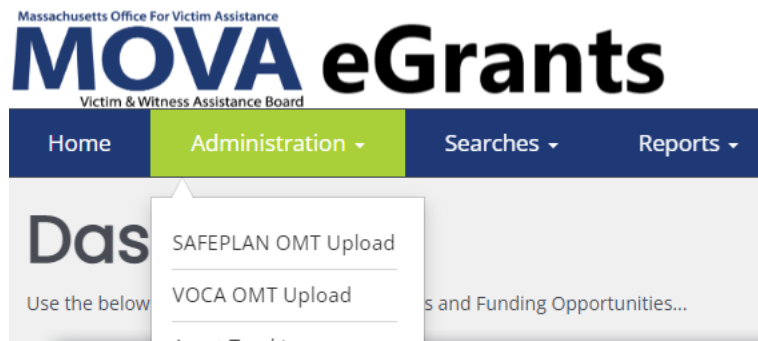
If further information is required by MOVA after the Acknowledgement Form has been reviewed, users will get a notification via email and the Compliance Monitoring process will return to Monitoring Finding Acknowledgement Required. This process can occur as many times as MOVA requires before approval is granted. Once all findings have been acknowledged and resolved successfully, the status will change to Monitoring Complete.

## The Outcomes Measurement Tool (OMT)

The Outcomes Measurement Tool submission can be initiated as described below. More detailed information about this process will be released in the future.

### *OMT Excel Document Upload*

The OMT Excel document upload tool can be found under the Administration dropdown in the top left side of the screen.



After selecting whether you would like to submit a SAFEPLAN or VOCA OMT, the user will be brought to the appropriate OMT Upload page. The OMT upload tool will allow a user to upload a completed quarterly OMT report. From this page, a user can also download the OMT file template, if needed, by clicking the hyperlink. This will download a blank version of the OMT file template (an Excel workbook) to your computer which can then be populated with the program's quarterly data.

**Definitions:**

Click [here](#) to download the file template. – The "here" is a clickable link for downloading the excel template to be saved And uploaded in the "Upload Here" row.

Upload Here – This Is where you can upload the excel document with your organizations data.

Organization – Select the Organization To upload the OMT data To.

Fiscal Year – Select the Fiscal Year this OMT Upload pertains to.

Period 1 | 2 | 3 | 4 – Select the Period you wish to upload the data for.

**Instructions:**

1. Click the "here" button And download the OMT Upload Excel Template.
2. Input your data onto the OMT Upload Excel Template And save to your computer.
3. In the Upload Here row, click the Select button And upload the saved copy of the OMT Upload Excel Document with your organization's data.
4. Select an organization to apply this data to. (A user will only have access to the organization they are a part of.)
5. Select the Fiscal Year this OMT Upload pertains to.
6. Select the Period for which this data pertains to. (A user cannot upload data unless the current data falls on Or within that periods date range.)

**Notes for Users**

All fields are required for selection Or entry.

If an Error Is displayed For any reason, it will display In RED.

If an Error Is displayed For any reason, upon correct, the upload will have to be re-added.

Successful uploads will display in GREEN And have a link to take a user to that OMT upload created.

Click [here](#) to download the file template.

Upload Here

Select

Drag File Here

Organization:

Fiscal Year



Period 1



Period 2



Period 3



Period 4

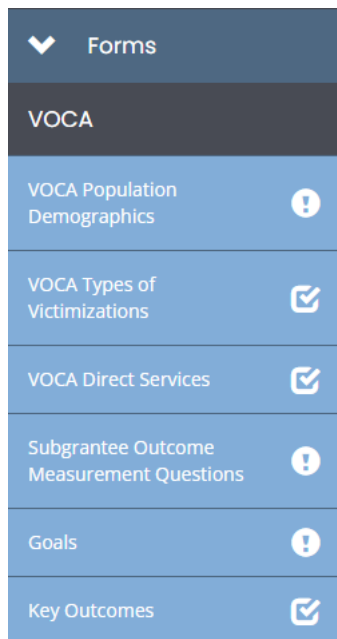
Once the user's OMT has been completed for a quarter, and all necessary data has been saved within the OMT file, follow the instructions on the OMT Upload page to upload your OMT file to the MOVA eGrants system. To successfully submit a completed OMT, the user must:

1. Upload the completed OMT file into the upload field – the file can either be dragged into the open field or you can choose the 'select' button to select the file from where it is saved on your computer
2. Select appropriate organization name
3. Select appropriate fiscal year
4. Select appropriate reporting period (period 1, period 2, period 3, or period 4)
5. Select the purple 'save' button in the upper right-hand corner of the eGrants window
6. Once you receive the message "OMT Upload Successful: Go to OMT Document", click on the hyperlinked 'Go to OMT Document' to view submitted data and review for any error messages

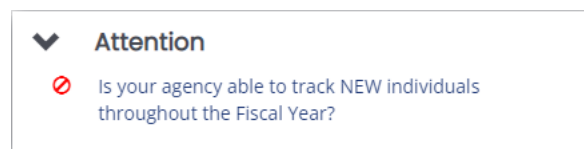
**WARNING: Once an OMT has been uploaded for a period, another OMT CANNOT be uploaded for that period. To edit information, visit the OMT forms within eGrants and change the data input manually.**

When viewing a submitted quarterly OMT within the eGrants system, you can click through the different sections of the OMT form using the navigation panel on the left side of the eGrants window. Any sections with a checkmark indicate that they are complete. Any sections with an exclamation point should be viewed as there is an error that must be corrected. For example, in the image below, the VOCA Population Demographics, Subgrantee Outcome Measurement Questions, and the Goals sections contain errors and need to be reviewed.

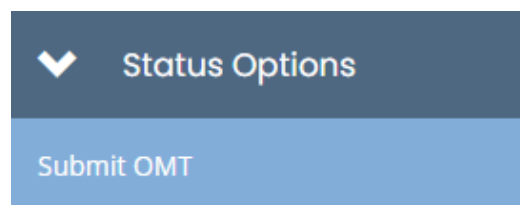





Once a form with an exclamation point is selected from the navigation panel on the left-hand side of the eGrants window, you will be taken to that form. Any error messages will appear in box on the upper right-hand corner of your screen. These errors should be corrected prior to saving the OMT form within the eGrants system. Error messages will look similar to the example below.



Once the user is satisfied with all the information in the OMT, and all forms have been saved, scroll to the bottom of the left-hand navigation panel to find the Status Options. Select Submit OMT. If there are any issues with the OMT, a box will pop up and detail any additional areas that require attention.



If the OMT is eligible for submission a box will appear confirming you want to submit and allowing you to write any notes to MOVA. Press “Ok” and your OMT will be submitted to MOVA for review.



Are you sure that you want to change the status from

OMT in Process to Submit OMT?

Please enter any notes in regards to this status change

Cancel

OK